

Forward Like-Kind Exchange Services

New Account Application

Thank you for your interest in J.P. Morgan Property Exchange Inc. (JPEX). We are providing an online version of our new account form for your convenience.

***Please note that the following form will allow you to type in designated fields and print the document. However, you may be unable to save the completed document to your computer hard drive or disk drive unless you have the full version of Adobe® Acrobat®. For more information about minimum requirements or to request related applications, please visit www.adobe.com ***

Once you have filled out the form completely, please print it out and sign it. Then, fax the copy back to us at one of the locations listed below, or email a scanned copy to us at JPEX_1031_Info@jpmorgan.com.

Boston	Chicago	Dallas	New York	Phoenix
Fax: 781-982-9558	Fax: 312-325-6507	Fax: 214-965-2082	Fax: 212-623-6277	Fax: 602-221-2420

IRS Circular 230 Disclosure

JPMorgan Chase & Co. and its affiliates do not provide tax advice. Accordingly, any discussion of U.S. tax matters contained herein (including any attachments) is not intended or written to be used, and cannot be used, in connection with the promotion, marketing or recommendation by anyone unaffiliated with JPMorgan Chase & Co. of any of the matters addressed herein or for the purpose of avoiding U.S. tax-related penalties.

Contact Us

J.P. Morgan Property Exchange Inc. (JPEX) is one of the country's leading providers of IRC Section 1031 Like-Kind Exchange (LKE) consulting and qualified intermediary (QI) services. JPEX has closed billions of dollars in tax-deferred transactions involving many property types such as real estate, aircraft, equipment, and collectables. The hallmark of JPEX is the provision of a high level of personalized service. JPEX's team of experienced professionals is skilled at conducting all types of LKEs.

For more information about the services and solutions offered by JPEX, contact us at **800 397 8529**.

New Account Application for Deferred Like-Kind Exchange**Taxpayer Information**

Taxpayer (Exchangor) Name			Taxpayer ID/SSN	
Taxpayer Street Address			Taxpayer Date of Birth, if individual	
City	State	Zip Code	Taxpayer Fiscal Year-End	
Occupation, if individual	Country of Citizenship	Primary Place of Business	Nature of Business	
Contact Name(s), if different from Taxpayer			Contact Telephone	
Contact Company Name & Mailing Address (if different from Taxpayer)			Contact Fax	
City	State	Zip Code	Contact Email Address	
Is taxpayer (Exchangor) a JPMorganChase client? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, name of primary contact at bank:				

Identification Documentation

Please attach the following taxpayer identification documentation. *We require this information and documentation to comply with the USA Patriot Act of 2001. To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person that opens an account. Thank you.*

<input type="checkbox"/> Individual <i>Please include: Photocopy of Individual(s) state license or passport(s).</i>	<input type="checkbox"/> Private Corporation <i>Please include: 1. Articles of Incorporation 2. Operating Agreement 3. Name(s) & Address(es) of principal(s) owning 20% or more interest..</i>	<input type="checkbox"/> Public Corporation <i>Please indicate: Ticker symbol and Firm website address</i>	<input type="checkbox"/> Partnership/Trust <i>Please include: 1. Articles of Partnership or Trust Agreement. 2. Name(s) & Residential Address(es) of Trustee(s) or General Partner(s) owning 20% or more interest.</i>	<input type="checkbox"/> Other: <i>Please call us to discuss required Documentation. Toll free: 800 397 8529</i>
---	--	---	---	--

Taxpayer's Tax Advisor (if applicable)

<input type="checkbox"/> Attorney <input type="checkbox"/> Accountant/CPA <input type="checkbox"/> Other: _____		
Firm Name		Telephone
Contact Person Name and Title		Fax
Mailing Address		Email
City	State	Zip Code

(Over)

RELINQUISHED PROPERTY INFORMATION (Property Being Sold)

Please complete as much information as is available.

Title Owner of Property (if different from Taxpayer)

Address or Short Description

City

State

Zip Code

Sale Contract for Relinquished Property is attached.
(Required to begin processing transaction)

Estimated Closing Date

☐ Yes ☐ No Date Expected:

Sale Price

Debt on Property (if any)

Buyer Name

Will you be offering Seller financing?

☐ Yes ☐ No

REPLACEMENT PROPERTY INFORMATION (Property Being Acquired)

Please include as much information as is available.

How many replacement property(ies) does the taxpayer (exchangor) intend to acquire?

Has the replacement property(ies) been located? If yes, please attach a copy of Sale Contract.

☐ Yes ☐ No

General Description or Address of Property(ies)

Estimated Closing Date(s)

Estimated Purchase Price(s)

ACKNOWLEDGEMENT

I have received, read and agree to the terms, conditions and disclosures contained in the J.P. Morgan Property Exchange Inc. (JPEX) Like-Kind Exchange Services New Account Application. I understand that the engagement of JPEX is subject to JPEX's standard internal credit and Know Your Customer review process and will be effective only upon the execution of mutually acceptable final documentation, including the Exchange Agreement and if required, Escrow Agreement. I understand JPEX has the right to revise this application if any material aspect of the transaction differs from its current understanding. I understand that JPEX must receive all executed documents prior to each closing. JPEX reserves the right to refrain from proceeding with any transaction if JPEX deems that there is insufficient time to close a transaction from time of receipt of required documents and information.

Deferred Like-Kind Exchange Checklist. Please return the following documents:

- ☐ Completed and Signed New Account Form
☐ Identification Documentation
☐ Sales Contract(s)

Signature of Taxpayer or Authorized Individual

Date

Name (please print)

Title

CONTACTING JPEX: J.P. Morgan Property Exchange Inc.

BOSTON

1001 Hingham Street
Suite 300
Rockland, MA 02370

Toll Free: 800 397 8529
Main: 781 871 6800
Fax: 781 982 9558

www.jpex1031.com

CHICAGO

MC IL1-1031
1 Chase Tower
Chicago, IL 60670-1031

Toll Free: 800 397 8529
Main: 781 871 6800
Fax: 312 325 6507

www.jpex1031.com

DALLAS

2200 Ross Avenue
Floor 6
Dallas, TX 75201

Toll Free: 800 397 8529
Main: 781 871 6800
Fax: 214 965 2082

www.jpex1031.com

NEW YORK

4 New York Plaza
Floor 21
New York, NY 10004

Toll Free: 800 397 8529
Main: 781 871 6800
Fax: 212 623 6277

www.jpex1031.com

PHOENIX

201 North Central Avenue
Floor 20
Phoenix, AZ 85004

Toll Free: 800 397 8529
Main: 781 871 6800
Fax: 602 221 2420

www.jpex1031.com

For Internal Use Only

F _____ I _____ S _____ F.A. _____ P.S. _____ Rep. _____ CAS ID # _____